

# TELECOM LEADERS' SUMMIT 2016

19<sup>th</sup> May 2016

Jumeirah Mina A'Salam – Joharah Ballroom,  
Dubai, United Arab Emirates



**ACCELERATING DIGITAL ECONOMY FOR  
BUILDING A BETTER CONNECTED WORLD**



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# Introduction



**Mr. Bocar A. BA**  
CEO  
SAMENA Telecommunications  
Council

There is an important element to our stride toward building a better connected world, and that is, better relationships among the industry's stakeholders.

Digital development, given its central role in the development of digital economies and the creation of smart digital societies, not to ignore, with its myriad of private-sector and public-sector stakeholders and complexities across all dimensions, now demands an unprecedented level of cooperation and sector-wide understanding of stakeholder priorities.

Devoid of a collective understanding of such priorities and issues, which could only be addressed through cross-stakeholder dialogue, no industry business model would work. True progress, time savings and operational efficiencies, fulfillment of national as well as international obligations, and the assurance of a viable and sustainable future for both business and socio-economic well-being now rest on the adoption of a collective mindset for setting and addressing digital development priorities.

Among the digital development priorities, the need to incentivize investment should remain at the top. To this effect, the innate market dynamics specific to this region should be kept in mind when policies are framed or when regulations are issued. There thus exists a dire need for defining and pinpointing what the real requirements in this region are, and what region-specific approaches can be adopted through stakeholder co-operation and willingness to achieve much larger, far-reaching digital development goals.

SAMENA Council as a sector development partner to regional stakeholders is uniquely positioned to help set far-reaching digital development goals, and to bring benefit to the regional economies. It is this role of SAMENA Council as the promoter

of stakeholder collaboration, which has been acknowledged by renowned leaders in this region, including heads of regulatory bodies, that shall afford new opportunities for its telecom operators and other members of its community.

Over the first decade since its existence, SAMENA Council has made significant contributions and it has been a privilege to work with both private-sector and public-sector stakeholders, and to earn the trust of governments and regulatory bodies. Our efforts have been recognized by TRA-UAE on various fronts, including on spectrum. SAMENA Council was chosen as a partner of choice by ITU and presently chairs ITU's CRO platform, with some of the world's largest companies participating. The Council brought taxation and private-sector business needs to the forefront of global policy dialogue (GSR). The need for improved collaboration and cooperation, as reiterated and advocated by SAMENA Council to decision-makers and regulators in the Leaders' Summit, has been elevated to the highest ministerial level within the region.

No national digital challenges could be overcome without inducing and sustaining mutual benefit for all the stakeholders involved, and guaranteeing their inclusion. It is this notion of stakeholder inclusion that has driven SAMENA Council's advocacy priorities to date, and which has made it possible for us to become among the strongest supporters of private-sector development and an advocate of telecom operators' sustainability needs in the region.

The Leaders' Summit is one of the key instruments used by SAMENA Council to demonstrate its focus on the needs of the private sector, in general, and of telecom operators, in particular.





**Mr. Charles Yang**  
President, Huawei Middle East

In the 10 years since the inception of the SAMENA Council, the ICT sector has seen immense growth. Today, connectivity is no longer considered a commodity; it has become an essential utility that ensures the prosperity of nations, industries and individuals alike.

As indicated in the recently compiled 2016 Global Connectivity Index Report by Huawei, a 20 percent growth in a country's ICT sector leads to a one percent growth in its GDP. In the GCC today, the average mobile penetration is more than 180 percent, and mobile broadband penetration is 70 percent. This connectivity has greatly changed people's lives and helped the region move closer towards its goal of becoming a knowledge-based economy.

Rapid change in the ICT sector means that industry stakeholders can no longer operate in siloes. As vendors, telecom operators, government agencies, and industry regulators, we must all work collaboratively for a better user experience.

The sector still faces some challenges – for example, bridging the digital divide between nations, and ensuring that

countries with less economic resources can still benefit their communities and be part of an open, technology-enabled global network.

A responsible player in the global community, Huawei is dedicated to supporting the creation and development of an ecosystem that is based on openness and collaboration for the greater good.

As the Internet of Things (IoT), autonomous vehicles and other smart technologies become woven into the fabric of our societies and everyday lives, faster, more reliable communications capabilities become a critical requirement to support the livelihood of communities across the globe.

Huawei's vision, 'Open ROADS to a Better Connected World', is our blueprint to achieve a 'Better Connected World'. By working together, we are able to draw a roadmap for the future of the ICT sector and help make the aforementioned challenges a thing of the past.

We look forward to working with all our partners to usher in the next phase of development in the ICT sector.



# Chairman's Keynote



## Dr. Khaled Biyari

Group CEO  
STC

As we all appreciate and understand for moving forward, throughout the past decade, we have witnessed much transformation in the regional telecoms technology and socio-economic landscapes.

As the enabling platforms of the digital economy, it is the telecom operators that have made among the most foundational contributions toward the society's ability to create and experience new possibilities. These are the fruits of investment in connectivity infrastructure that telecom operators have made possible for us to reap; recognizably, in various instances, in engagement with the policy-makers.

To put matters in perspective, more than 4 billion users of the Internet will be online in a matter of months from now. Out of these, a wide majority, in one form or another, will be using over-

the-top platforms - a major disruption and innovation within the industry - to stay connected and access user-generated data, among other content. This world of ubiquitous connectivity, majorly created by telecom operators, is taking us into the human-to-machine realm. This realm, in turn, will lead us into creating smarter societies, which will require efficient approaches for offering improved insurance of socio-political and socio-economic participation.

In our recently held Leaders' Summit 2016, the coming together of the distinguished leadership reinforced this realization, enabling us to better visualize the roles and the responsibilities that the digital world now demands of the stakeholders and the decision-makers. Harmonized approaches, which are essential to tackling a myriad of widespread issues and challenges within the telecommunications and ICT industry, now demand very open communication among the private-sector and the public-sector stakeholders. The inspiration to create

new possibilities, the incentivization to make sustainable investments in digital infrastructure and technologies, and the courage to take new risks, all need to be infused together.

Success in the digital, smart world is dependent on attaining a deep understanding of the evolving digital ecosystem and the value-chain; fostering sustainability of the business; and adopting a partnership-oriented mindset across the stakeholder spectrum. For telecom operators, in particular, to thrive and not simply survive, such approaches are integral to ensuring success in the future.

As a matter of shared commitments, policy-makers need to incentivize innovation and operators can tangibly help drive it, in order to promote economic growth and development of knowledge-based economies. Suffices it to say also that, amidst our aspirations, however, there lies a need for our collective action, whereby policy makers and telecom operators' involvement with each other needs to become a reliable conduit of support and a catalyst for realizing new solutions to developmental challenges.

SAMENA Council's Leaders' Summit 2016 has set a tradition of sharing insights, common needs, and open heartedly exchanging valuable information to help us all define new imperatives in our cooperative endeavors, and to align our priorities for accelerating digital economic development and smart transformation of our societies. It was a pleasure to be in the company of the global and the regional leadership at the Leaders' Summit.



# Minister's Speech



## H.H. Sheikh Nahyan Bin Mubarak Al Nahyan

Minister of Culture, Youth, and Community Development  
United Arab Emirates

Leaders' Summit is an extraordinarily important meeting. International forces are poised to vastly improve internet access around the world. The SAMENA Telecommunications Council must contribute to that global effort.

I want to thank Huawei for hosting this summit. My opinion of Huawei is quite high. Their presence here today illustrates how deeply they value the connection between technological development and national and global prosperity, and how seriously committed the company is to the well-being of the communities in which they operate.

I also welcome you all to Dubai and to the United Arab Emirates. I especially welcome ITU Secretary-General, H.E. Mr. Houlin Zhao. A landmark international conference last month in Washington, DC, recognized and called on his expertise. As you all probably know, the US Department of State has launched the Global

Connect Initiative. It aims to mobilize innovative ideas and public and private resources so that an additional 1.5 billion people will have access to the internet by the year 2020. The US State Department is so committed to the initiative that it has established in each of its embassies worldwide a digital officer prepared to provide local assistance.

The World Bank enthusiastically supports the initiative. Many of you have probably studied the bank's recent report titled "Digital Dividends." It deals directly with virtually all matters pertinent to the SAMENA Telecommunications Council. The authors held consultations in some of the countries in our region, including the United Arab Emirates. The extremely impressive report notes the fundamental need to increase internet access since nearly sixty percent of the world population remains offline. But the report looks beyond the challenge of connectivity. It declares that (and I quote):

**Vested business interests, regulatory uncertainty, and limited contestation across digital platforms could lead to harmful concentration in many sectors. Quickly expanding automation, even of mid-level office jobs, could contribute to a hollowing out of labor markets and to rising inequality. And the poor record of many e-government initiatives points to high failure of ICT projects and the risk that states and corporations could use digital technologies to control citizens, not to empower them.**

The World Bank advocates a three-pronged approach to those problems. It says that digital investments need support in these matters:

1. **Regulations**, so that firms can leverage the internet to compete and innovate.
2. **Skills**, so that people can take full advantage of digital opportunities.
3. **Institutions**, so that governments can respond to citizens' needs and demands.

# Minister's Speech

The bank adds that digital technologies can, in turn, augment and strengthen efforts in regard to regulations, skills, and institutions and therefore accelerate the pace of development.

The case for advancing in the manner and direction outlined in "Digital Dividends" is quite compelling. The vision of the World Bank report reminds me of the belief of our country's founder the late Sheikh Zayed Bin Sultan Al Nahyan. He said (and I quote):

***Science and culture are the basis of the nation's progress, the underpinning of civilization, and the cornerstone of the prosperity of nations.***

Science and its resulting technology in the twenty-first century offer the world a wonderful opportunity for progress. But as Sheikh Zayed so wisely understood, science and technology are inevitably deployed within specific cultures. The cultures that dominate from country to country ultimately determine whether or not science and technology can fulfill their enormous potential. In countries such as the United Arab Emirates where the leadership has instituted policies that encourage innovation, investment, and vibrant connectivity, science and technology have propelled the nation's progress.

As a citizen of a country that has embraced the digital world, I am delighted that there are people such as you who have resolved to master that world. Our country, the United Arab Emirates, relies on your knowledge and skill. In our forty-four years as a nation we have purposefully become a member of the global society and have moved perhaps most zealously to develop our technological capacity.

Under the wise leadership of the President, His Highness Sheikh Khalifa Bin Zayed Al Nahyan, our country continues to value technological competence, especially as it supports education, business and finance, a sustainable environment, health care, and an innovative, productive, and prosperous society. Reinforced by the leadership of the Vice President, Prime Minister, and Ruler of Dubai, His Highness Sheikh Mohammed Bin Rashid Al-Maktoum, and His Highness Sheikh Mohammed Bin Zayed Al-Nahyan, Crown Prince of Abu Dhabi and Deputy Supreme Commander of the Armed Forces, His Highness Sheikh Khalifa presides over a country deeply enmeshed in IT networks, a country taking full advantage of the

possibilities of the digital world. Dedicated to building and sustaining a knowledge society, we fully understand that our future is based on the creative energy of our people who must be well educated, committed to economic and technological progress, willing to compete in the global marketplace, and connected by modern technologies, in well-equipped institutions and facilities.

Let me close by referring to what US Secretary of State John Kerry asserted in opening the deliberations of the Global Connect Initiative that (and I quote): "The internet is essential to economic prosperity in the twenty-first century." I might rephrase his remark to say that the SAMENA Telecommunications Council is essential to the economic prosperity of our cooperating countries. Another leader, our special guest, ITU Secretary-General H.E. Mr. Houlin Zhao, recently observed that even more important than increases in broadband transmission speed is (and I quote) "the way broadband will change our approach and transform the ways in which we do things." I might rephrase that remark to say that the SAMENA Telecommunications Council has the potential to transform the world.

In other words, you hold in your hands a significant part of the power that can bring monumental change, progress, and prosperity to the SAMENA region. I deeply appreciate your respect for your responsibilities and wish you the greatest success in your endeavors.







## Leaders' Summit 2016

### The Current State and Future Requirements of the Telecoms & ICT Industry

Future success of the SAMENA region's telecoms and ICT industry requires a makeover. Understanding challenges of the digital economy and the stakeholders' need for aligning common priorities in a better connected world are the new collaboration imperatives for shaping the future of the digital marketplace.

It is a matter of utmost importance now that future decision-making among stakeholders be aided in the best manner possible, particularly through the exchange of information and knowledge among the decision-makers. To this effect, SAMENA Council's Leaders' Summit, an annual top-tier stakeholders' meeting being organized since 2010, was recently held in Dubai, UAE.



More than ever before, some of the rarest congregations of regional and global leaders from the public and the private sectors were witnessed during the Leaders' Summit, which included high-profile meetings of industry decision-makers and the champions of ICT development. Two of the most important events within the agenda of the Leaders' Summit 2016 were the ITU & Telecom Operators Meeting, which included representation from GSM Association, and the launch of SAMENA Council' Leaders' Roundtable (SALT), a platform for regulators and telecom operators to align themselves on common priorities.

The central aim of the ITU & Telecom Operators Meeting, envisaged and facilitated by SAMENA Council and held for the first time between ITU's top leadership and telecom operators' top leadership as a closed-door interaction, was to foster direct dialogue between telecom operators and the global UN telecommunications development agency, with the larger purpose of inducing intellectual proximity among telecom operators and national telecom regulators.

Responsibilities of telecom operators toward themselves and toward the industry, need for fair regulatory approaches, inclusion of over-the-top players into the regulatory net to foster fair market competition, the need to expunge the myth that telecom operators are overly profitable and thus should be heavily taxed, and an emerging trend of excessive regulatory interference under the pretences of consumer protection or national security, were among the areas of discussion of the meeting.

Similarly, the SALT Meeting brought regulators and operators together, to corroborate an industry-wide understanding that the business cannot continue in the same way and at the same pace as it was in the second or third-generation of the industry's development. Regulatory perspectives drew attention to operators' need to present recommendations





# Abstract

and solutions to the issues they face, while operators' perspectives focused on unnecessary regulatory interference and insufficient incentives to support operators' investment and return-on-investment needs. As part of the new regulatory approaches, operators voiced their need for protection of their investment interests by the regulators. Conclusions drawn from the discussion in the meeting pointed to sustaining such dialogue. For this purpose, the SALT Meeting will continue to take place in the future.

In the esteemed presence of International Telecommunication Union Secretary-General H.E. Mr. Houlin Zhao, with active participation of top leaders from telecom operators, including the SAMENA Council's Board



of Directors, as well as regulatory authorities from the region, Leaders' Summit, one of the regional industry's most anticipated top executive events, brought together renowned personalities from the Middle East, Africa, Asia Pacific, South Asia, and Europe.

A key milestone witnessed by the regional public-sector and private-sector leadership during the Leaders' Summit was the signing of an MOU between Mohammed Bin Rashid Smart Learning Program (MBRSLP), the International Telecom Union (ITU), UAE's Ministry of Education, and Telecom Regulatory Authority of the UAE. The signing ceremony was attended by dignitaries from the UAE as well as from other regional governments, Group CEO's from the region's largest telecom operators, including top leaders from SAMENA Council's member companies.

In addition the leadership dialogue, the participants' responses to automated survey questions further provided insights into the biggest perceived current challenge that the industry faces; that is, fragmented regulatory guidelines and





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issues in effective stakeholder cooperation. A significant percentage of the audience, through the automated voting system, indicated that many countries have yet to set priorities on framing national ICT development plans; a challenge that can be overcome through better communication. Regarding IoT, no responses related to IoT's impact on education were indicated, which shows that the industry has yet to define diverse roles of IoT and that much potential for tapping IoT's hidden opportunities, including in the education sector, exists.



Leaders' Summit 2016 was a reflection of the advocacy and lobbying efforts that SAMENA Council exerts on behalf of its telecom operators. The presence of both global and regional top leadership in the Summit evidenced willingness among decision makers to understand and address the industry's challenges that could impact the growth of many other sectors related to ICT development. High profile reminders, such as given by H.H. Sheikh Nahyan Bin Mubarak Al Nahyan, reverberated with the realization that SAMENA Council must contribute to global ICT development. Expressions of faith and trust shown in SAMENA



Council's capacity to change the world and bring transformation to the economies of the region provided sufficient proof of the success of the Leaders' Summit and the fulfillment of the objectives for which the Summit was held, and, moreover, in which the imperative to ensure stakeholder inclusion, align common priorities, and adopt a partnership-oriented mindset was redefined.





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# Discussions

## **Panel 1: Necessities of the evolving market in the SAMENA region, and relevant legislation and regulation**

**Summary:** by Mr. Bahjat El-Darwiche, Partner, Strategy& (formerly Booz & Company), part of the PwC network

There is widespread agreement among policymakers about the importance of digital economies, at least in theory. Digitization plays a key role in building diverse and efficient economies, and the telecom industry, for its part, is the enabler and backbone of this digitization. The question is what should the industry be doing, at this juncture of its development, to advance digitization? This was the topic of discussion for the panel of regulators and senior executives from telecom operators in the region.



### **The need for concerted action:**

A constant theme of the panel discussion was the need for all stakeholders in the telecom sector – including operators, policymakers and regulators – to move in the same direction for the benefit of the industry and society as a whole. Too often, there has been a disconnect between what policymakers envision, what the regulators are prescribing, and what the operators are seeking to achieve. Unless there is more coherent cooperation, the vision of a highly digitized society will be unattainable.

When such collaboration occurs, however, the effect is powerful and beneficial. In the United Arab Emirates (UAE), for example, the two telecom operators are working closely with policymakers and regulators in ensuring that the information and communications technology (ICT) element of the government's UAE Vision 2021 is fulfilled. The relevant key performance indicators, which are constantly tracked, include the availability and affordability of broadband, and the impact of digitization on society. Here, at least, the key stakeholders are moving ahead together and speaking the same language.

### **Assessing the state of the telecom market and its challenges:**

The conference audience, containing regulators and senior executives from operators, was asked several survey questions about the state of the telecom market in the South Asia – Middle East – North Africa (SAMENA) region. Although more than half (55%) of the respondents were either very or moderately confident about growth prospects for the industry in the next twelve months, 34% expected stagnation and 12% predicted the market would shrink.

When asked to name the major challenges facing the industry, three responses dominated. "Pressure from OTTs (over-the-top providers) and adjacent ICT players" was cited by 30% of the audience, while "lack of conducive laws and regulations" and "fragmented sector governance and stakeholders' cooperation" was selected by 22% and 20% respectively.

Judging by the panel discussion, these answers appear to be closely linked. Operators believe that regulators have sometimes been slow to adapt to the changing realities of the market. Telecom companies now face stiff competition from outside the narrow confines of the traditional industry, from OTTs and others. They feel that regulators should always be mindful of this transformation and should price spectrum licenses.



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## **Call for regulation to adapt to a new era of broader competition:**

Indeed, what the industry has witnessed in recent years is not evolution, but revolution. Going back to the mid-1990s, the competitive environment was very different. An operator would pay a fee for a spectrum license, invest in the network, and would then be the sole gatekeeper of the limited number of services provided.

Some regulators, it was argued, have simply taken the historical spectrum fee and continued to adjust it for inflation, without taking into account how much has changed over the last twenty years. Nowadays, a telecom operator offers a great variety of services, and the ability to provide these is dependent on continual investment.

Not only are these demands for investment growing, but operators are engaged in a constant battle for revenue. The telecom market has evolved into a broader, digital one. If you take only the traditional telecom companies in a particular country, then perhaps two or three companies might offer SMS service to customers. However, when you also incorporate into your perspective companies such as Facebook and WhatsApp, which also offer SMS services, then it becomes clear that the competitive landscape has been drastically altered.



Moreover, while telecom players are heavily regulated, other players in the digital market may well not be confronted by similar barriers. Such companies tend to operate their services on a global basis, and are not therefore subject to local regulation in the same way. Regulators will have to look at the market in its entirety, so that operators do not have their hands tied by regulation which does not apply in a similar way to their direct competitors.

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Regulatory changes are already in the pipeline in Europe as a direct result of this changing competitive landscape, as OTT players confront traditional telecom operators. The only argument now seems to be whether there should be a levelling up or a levelling down of the playing field. One thing is certain. Telecom operators will struggle to compete effectively until the field is indeed level, one way or the other.

## **The need to free resources for investment:**

Unless the spectrum license fee reflects this new ecosystem, operators will have fewer resources to invest in upgraded infrastructure. It is envisaged, for example, that 5G mobile networks will launch in the next few years. However, the emergence of such high-speed, low-latency networks will only result from massive expenditure.

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If an investment-friendly climate is to be achieved, regulatory accounting must also keep pace with modern-day realities, such accounting must be geared towards encouraging investment, not deterring it. Previous accounting methods may have suited the gradual improvement of infrastructure, laying fibre alongside the existing copper cable, but it may well be inappropriate when operators have to build entirely new infrastructure from scratch.

The demand for changes in the regulatory system is not limited to calls for more generous fees for spectrum allocation and modifications to accounting methods. It was also felt that spectrum harmonization – the uniform allocation of radio frequency bands across entire regions, not just individual countries – would allow operators to produce equipment in bulk for a much larger area, thus reducing cost.

## **Call for minimalist and consistent regulation:**

Several, more general, comments were made about the regulatory climate. One panelist argued that governments should focus, first and foremost, on creating a genuinely competitive environment. Once this has been achieved, the need for regulation is greatly reduced. Consumers themselves will decide, for example, how they should be billed, whether per second or per kilobyte. If they don't like a service, the operators will lose business. The state should simply ensure competition is fair, regulate the spectrum, but reduce intervention in each and every aspect of operators' activities.

Regulatory consistency and predictability are paramount if operators are to invest with confidence. On the other hand, if these qualities are absent, investment will be stymied. Such an ideal regulatory environment can only be achieved through constant cooperation and dialogue between policymakers, regulators and operators.



# Discussions

## The need for shared solutions for remote areas:

The telecom industry must unite to provide coverage for more remote areas. Mobile operators often say that ensuring coverage for the last 5% of the population is just as expensive as building the relevant infrastructure for the bulk of the population who reside in urban or heavily populated regions. Commercial agreement between operators, based on the principle of mutually beneficial cooperation, should set out plans for network and spectrum sharing. This in itself requires a change in philosophy. Instead of viewing all their infrastructure as a source of competitive advantage, operators should use their imagination to identify cost-effective, shared solutions for spreading network coverage in far-flung areas.



## The key importance of internal talent management:

Workforce skills must keep pace with the speed of the transition to a digital economy. Operators should examine carefully how digital companies, outside the traditional telecom sector, are conducting their business, how they recruit and train staff to generate innovative, new products. Many consumers are already very comfortable with digital technology and many governments are buying into the digital trend. Telecom companies must rise to the challenge, build the relevant skills and capabilities internally, and assume the role of digital champions of their countries and economies.

Despite some differences of opinion, the panel was clear on what needs to be done to move the industry forward. Close cooperation between policymakers, regulators and operators is essential. Some best practice examples of this cooperation already exist for others to follow. Decision-making must always move with the times. A solid grasp of how the industry is changing, and where it is heading, should secure astute and balanced strategies and resulting progress.

<sup>1</sup> Bahjat El-Darwiche, Alastair Macpherson, Mahmoud Makki, Mustafa Uçar, and Jad El Mir, "Accelerating high-speed broadband in Turkey: Foundations, barriers, and policy considerations" (Strategy&, 2016) (<http://www.strategyand.pwc.com/reports/accelerating-high-speed-broadband-in-turkey>).



# Discussions

## Debate on the need for a shift in government mind-set:

Any fundamental change in regulatory outlook will only result from a corresponding shift in the mind-set of government agencies. There was some difference of opinion between operators and regulators within the panel about whether this change in mind-set has already taken place.

One point of view was that national authorities too often think of the telecom industry purely as a potential source of short-term revenue. Instead, it was felt, they must always be aware of mounting empirical evidence which demonstrates the positive impact of broadband adoption and availability on the GDP growth of a particular country.

It was said that regulators want to have their cake and eat it, too. They want stimulation of ICT growth, they want broadband availability to be widespread, but operators are nonetheless hindered from realizing these aims by excessive regulatory interference in the minutiae of day-to-day business. In other words, government rhetoric and regulatory actions do not necessarily tally.

An alternative perspective was also put forward. Some governments in the region, it was said, have indeed seen the big picture. With oil prices decreasing, focus has switched to developing the economy through other means, with a vision of smart cities and smart economies. According to this narrative, governments are well aware that an advanced ICT infrastructure provides an essential means of economic progress and innovation. The cooperation between the government and operators in the UAE, working together to fulfill an ambitious ICT vision, is evidence of this new emphasis.

Indeed, the audience survey revealed that almost half the countries in the region (45%) have an ICT development/national digitization plan in place, and are currently implementing it. However, 40% say that either a plan is in place but not being implemented, or that the plan is still in development. More worryingly, 16% have no such plan in place, with digitization not considered a priority by the government.

## How operators can create sustainable market demand:

Operators themselves have several responsibilities, and challenges to overcome, if the transition to a truly digital economy is to be successfully completed.

One key question is how operators go about creating the level of consumer demand that compensates for the original outlay on the infrastructure. A PwC survey in Turkey revealed that the fundamental issue in that country is not supply. Only about 2% of Turkish homes lack access to a fixed broadband connection. However, more than half of households (54%) have not taken advantage of this service. 'Low digital literacy, limited device penetration, and lack of relevant local content were considered to be major factors for this low household take-up.

One panelist suggested that the demand for fixed broadband could potentially suffer from a competitive mobile market, which forces down consumer prices for mobile broadband. Operators therefore face a dilemma. Should they invest heavily in fixed broadband when the mobile alternative is so attractive to consumers? The industry has reached a critical point in this regard. Operators need to find a pricing structure which encourages substantial take-up of fixed broadband. They need to look beyond the short term to the bigger picture. Mobile broadband will not be able to cope with predicted demand for functions related to virtual reality and artificial intelligence, which are set to proliferate.

A more optimistic note was also struck. One panelist suggested that once you build infrastructure, people will always use it sooner or later. Certainly, the evidence in many countries points to this conclusion. As infrastructure projects take a long time, you must have confidence in the future and start planning and building now. The infrastructure will then be ready when more advanced applications are ready to use.



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## Panel 2: Viable areas of investment and stakeholder partnership

**Summary:** by Mr. Karim Taga, Global Practice Head Arthur D. Little TIME practice, chair of the Panel

The objective of the panel was for the drivers to accelerate digital economies for a better connected world. Telcos could play a critical role and create a substantial opportunities by leveraging their key assets: managed services in secure networks, brand, distribution, digital capabilities, communication etc.

### **Viable investment can be accelerated in a regulatory friendly environment:**

Before expanding in new areas beyond adjacent markets, the panelist agreed that several elements have to be considered and fixed:



#### **1) Focus on the core with the support from an evolving regulatory framework :**

There are still major investments required to modernize the network(s), from 4G, 4,5G and FTTH as well as the backhaul to deliver up to the bandwidth expectation of consumers and businesses. However, in order to support this development, regulators and government authorities shall quickly close the gap on several dimensions:

- Spectrum: there are huge deficits in the MENA region compared to Europe or the US, additional spectrum shall be freed up for the mobile operators to be able to cope with the explosion of data demand
- Level playing field: telcos are regulated differently from OTTs, however many services used by consumers and business are based on the same principle covering the ICT needs (digital services). Hence, telcos are expecting the same laws and regulations to be applied on OTT related to customer privacy, tax regime, data storage, bundling (HW and services) etc. alternatively telcos shall be as little regulated as the OTTs.
- Broadband regulation: there is a gap to be closed re the broadband connections to households and business premises with FTTH. This is possible as shown in several regions that best practices are based on few principles: reduce regulation in dense urban areas and areas with high economical value and subsidize rural areas and less attractive economical areas and provide subsidies to reduce the digital gap. PPP models works best when driven by the private telco sector rather than driven by government entities.





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## 2) Telcos needs to further improve their operating model:

Even though the regulatory framework is evolving and investments will continue, what is critical before expanding the business beyond the core, telcos needs to work on 3 critical areas:

- **Convergence:** the demand in particular in the enterprise environment is becoming more convergent, distinguishing fixed and mobiles services in a new and evolving environment to anywhere, anytime, everywhere: accessing data, processing transaction using different devices, requires a redesigning of the production model, cloud based and access technology neutral, hence harmonized value proposition incl. transparent pricing model are expected
- **Customer Experience:** telcos have to improve dramatically consistency across all channels in delivering their value propositions "omni-channel", that requires a redesign their internal processes as well as their enabling layer backed by the IT platforms. Without a transformation of their customer interfaces, increasing NPS will remain a key challenge as the number of new services keeps increasing



- **Rethink the factory:** in cloud based production environment, the network and production model of telcos shall evolve by leveraging SDN and NFV capabilities i.e. run efficient networks across geographies. This future proof development will certainly enable operators to reduce time to market and improve their quality of services providing fast and on-demand services. The regulatory framework has to evolve in order to enable this evolution in particularly with regards to how customer data are managed across borders

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## Accelerating the digital transformation in the economy:

It is undisputed that telco's assets and evolving capabilities can be leveraged to accelerate the digital transformation of the society as well as support enterprises to gain a competitive edge:

### 1. Before transforming others – start by yourself:

It is clear that telcos started only recently to build capabilities in the digital space (3rd party management with OTT and the development community), reshape their customer interfaces enhancing their on-line and e-care channels and well as following open innovation models with startups. So the culture is changing rapidly and they are winning credibility to manage these services to large enterprises as well as verticals.



### 2. Develop a culture of entrepreneurs:

Telcos are in a strong position to stimulate talent development and create an entrepreneurship-culture beyond their companies. Startups and SME could act as speed boats and engine of innovation creating value in the digital economies. Several models exists from funds, accelerators, incubations platforms up to selection of best companies awarded on their innovation contribution can be considered. There is a tremendous potential in the region, telcos shall focus and capitalize on their network of multi eco-systems there are active in.

### 3. Invest and develop verticals:

With the emergence of Internet of Things, Machine to Machine, Virtual reality, Augmented Reality, Robotics and BigData technologies impacting heavily all industrial and human processes of every company: from banks ... to ... utilities, telco have a strong legitimacy to exploit these emerging technologies and define the appropriate business model to create value for them as well as for the verticals. From the discussion the first industries considered where: utilities, financial services, health care, transportation (mobility) as well as in public sector e.g. smart cities, all panelist agreed that telcos have a strong role to play as a key enabler in the digital transformation journey of our economy.



# Leaders' Summit 2016 Achievements

## Leaders' Summit 2016 Provides Perspectives on the Current State and Future Requirements of the Telecoms & ICT Industry

Each stakeholder has contributed noticeably to the progress of the SAMENA region's telecommunications industry. Its future success, among many requirements, now rests on a complete makeover. Policy decisions and regulations made during earlier times and under past market conditions or technology and infrastructure investments that were enabled and realized by telecoms operators, or the entry and onslaught of alternative market players, all have contributed to the growth of the telecoms and ICT marketplace over the years.

Understanding challenges of the digital economy and the stakeholders' need for aligning common priorities in a better connected world are the new collaboration imperatives for shaping the future of the digital marketplace.

Digital development, given its central role in the development of digital economies and the creation of smart digital societies, not to ignore, with its myriad of private-sector and public-sector stakeholders and complexities across all dimensions, now demands an unprecedented level of cooperation and sector-wide understanding of stakeholder priorities. Devoid of a collective understanding of such priorities and issues, which could only be addressed through cross-stakeholder dialogue, no industry business model would work. That is, it is no longer feasible to achieve true progress, save time, realize operational efficiencies, meet national as well as international obligations, and ensure a viable and sustainable future for both business and socio-economic well-being purely based on individualized priorities and by maintaining a silo mentality.

It is a matter of utmost importance that future decision-making among stakeholders be aided in the best manner possible, generating prolific exchanges of information and knowledge among the decision-makers. To this effect, SAMENA Council's Leaders' Summit, an annual top-tier stakeholders' meeting being organized since 2010, was recently held in Dubai, UAE.



# Leaders' Summit 2016 Achievements

## Some of the rarest congregations of regional and global leaders from the public and the private sectors were witnessed, including high-profile meetings of industry decision-makers and the champions of ICT development

More than ever before, some of the rarest congregations of regional and global leaders from the public and the private sectors were witnessed, including high-profile meetings of industry decision-makers and the champions of ICT development. Two of the most important events within the agenda of the Leaders' Summit 2016 were the ITU & Telecom Operators Meeting, which included representation from GSM Association, and the launch of SAMENA Council' Leaders' Roundtable (SALT), a platform for regulators and telecom operators to align themselves on common priorities.



The central aim of this one-of-a-kind ITU & Telecom Operators Meeting, envisaged and facilitated by SAMENA Council and held for the first time between ITU's top leadership and telecom operators' top leadership as a closed-door interaction, was to foster direct dialogue between telecom operators and the global UN telecommunications development agency, with the larger purpose of inducing intellectual proximity among telecom operators and national telecom regulators.

Responsibilities of telecom operators toward themselves and toward the industry, need for fair regulatory approaches, inclusion of over-the-

top players into the regulatory net to foster fair market competition, the need to expunge the myth that telecom operators are overly profitable and thus should be heavily taxed, and an emerging trend of excessive regulatory interference under the pretences of consumer protection or national security, were among the areas of discussion of the meeting.

Similarly, the SALT Meeting brought regulators and operators together, to corroborate an industry-wide understanding that the business cannot continue in the same way and at the same pace as it was in the second or third-generation of the industry's development. Regulatory perspectives drew attention to operators' need to present recommendations and solutions to the issues they face, while operators' perspectives focused on unnecessary regulatory interference and insufficient incentives to support operators' investment and return-on-investment needs. As part of the new regulatory approaches, operators voiced their need for protection of their investment interests by the regulators. Conclusions drawn from the discussion in the meeting pointed to sustaining such dialogue. For this purpose, the SALT Meeting will continue to take place in the future.

In the esteemed presence of International Telecommunication Union Secretary-General H.E. Mr. Houlin Zhao, with active participation of top leaders from telecom operators, including the SAMENA Council's Board of Directors, as well as regulatory authorities from the region, Leaders' Summit, one of the regional industry's most anticipated top executive events, brought together renowned personalities from the Middle East, Africa, Asia Pacific, South Asia, and Europe.





# Leaders' Summit 2016 Achievements

A key milestone witnessed by the regional public-sector and private-sector leadership during the Leaders' Summit was the signing of MOU between Mohammed Bin Rashid Smart Learning Program (MBRSLP), the International Telecom Union (ITU), UAE's Ministry of Education, and Telecom Regulatory Authority of the UAE. The signing ceremony was attended by dignitaries from the UAE as well as from other regional governments, Group CEO's from the region's largest telecom operators, including top leaders from SAMENA Council's member companies.

## Key insights from leaders' dialogue included:

- The need for more partnership-oriented mindset reiterated
- SAMENA Council's efforts in promoting local and regional ICT developments recognized by regulatory bodies
- Emphasis placed on the need to invest in capacity and building the ecosystem as well as robust frameworks for collaboration and cooperation between telecom regulators and operators
- ITU's support to the industry, including the need for spectrum, especially with rising focus on 5G development, communicated during stakeholder meetings
- The need to rethink the new definition of broadband
- New perspectives on artificial intelligence (AI) and virtual reality (VR) as the next big things in our technological evolution, and, contrary to the common belief, their positive impact on job-creation for humans
- Operators' and regulators' consensus on adopting a common language to be able to communicate more effectively
- Common understanding on the prevailing disconnect between operators and regulators, addressing which is imperative to fulfilling visions of digital and socio-economic development
- The need for pro-investment frameworks instead of the current purely customer-oriented frameworks
- The need for creating good environment among operators and regulators, and the realization among regulators to adopt a level-down approach toward regulation
- Operators' belief that with demand for less regulation comes a responsibility to commit to fulfilling certain responsibilities
- The concept of a global telecom operator introduced in continuation of a reference made to "nation-oriented" approaches by telecom operators



# Leaders' Summit 2016 Achievements

**In addition the leadership dialogue, the participants' responses to automated survey questions further provided insights into the biggest perceived current challenge that the industry faces; that is, fragmented regulatory guidelines and issues in effective stakeholder cooperation.**

A significant percentage of the audience, through the automated voting system, indicated that many countries have yet to set priorities on framing national ICT development plans; a challenge that can be overcome through better communication. Regarding IoT, no responses related to IoT's impact on education were indicated, which shows that the industry has yet to define diverse roles of IoT and that much potential for tapping IoT's hidden opportunities, including in the education sector, exists.



**High profile reminders, such as given by H.H. Sheikh Nahyan Bin Mubarak Al Nahyan, reverberated with the realization that SAMENA Council must contribute to global ICT development**

Leaders' Summit 2016 was a direct indication of the advocacy and lobbying efforts that SAMENA Council exerts on behalf of its telecom operators. The presence of both global and regional top leadership in the Summit evidenced willingness among decision makers to understand and address the industry's challenges that could impact the growth of many other sectors related to ICT development. High profile reminders, such as given by H.H. Sheikh Nahyan Bin Mubarak Al Nahyan, reverberated with the realization that SAMENA Council must contribute to global ICT development. Expressions of faith and trust shown in SAMENA Council's capacity to change the world and bring transformation to the economies of the region provided sufficient proof of the success of the Leaders' Summit and the fulfillment of the objectives for which the Summit was held, and, moreover, in which the imperative to ensure stakeholder inclusion, align common priorities, and adopt a partnership-oriented mindset was redefined.



# Industry Leaders Speak Out



**Dr. Khaled Biyari**  
Group CEO, STC

"The SAMENA Leaders' Summit was created to act as a platform for the dialogue among all the stakeholders of our Telecom industry in the SAMENA region. We were honored this year to have with us prominent industry figures such as His Excellency the ITU Secretary General, a number of Heads of Regulatory organizations, CEO's of major operators in the region, and different experts from around the globe. The Summit created strong atmosphere of collaboration and engagement among the stakeholders through the different public and private sessions that discussed major issues facing the industry. We are hopeful that this will set us for further success in the future."



**Mr. Ihab Hinnawi**  
Group CEO, Batelco Group

"Without a doubt, the SAMENA Telecom Leaders' Summit is a first class gathering of the key players in the region's communications industry. It is a unique event bringing all of the major ITU, Regulatory and Telecom heads together in an open debate to discuss major issues impacting the elevation of the industry. This unmatched platform for discussion, debate and networking that facilitates knowledge sharing and learning opportunities, is of great benefit to all concerned. I found the experience very inspiring and extend grateful appreciation to the organizers for their excellent efforts to bring it all together."



**Dr. Kamal Shehadi, PhD**  
Chief Legal and Regulatory Officer, Etisalat Group

"SAMENA Council has gathered the operators, investors, regulators, and other stakeholders to discuss the challenges that the telecom and digital industries face at a time of great opportunities but also great challenges."



# Industry Leaders Speak Out



**Sheikh Talal Said Marhoon Al Mamari**  
CEO, Omantel

"SAMENA has been working as the region's telecom think-tank through open collaboration addressing the requirements of the telecom operators collectively while engaging with various stakeholder from policy makers, regulators and other Telecom bodies. In addition, SAMENA has worked on a number of telecom initiatives and has been playing a vital role in addressing the digitization program in the region by conducting a detailed countrywide ICT study taking into consideration the socio-economic developments, regulatory obligations, and other challenges operators face."



**Mr. Hakam Kanafani**  
Board of Directors and Chief Adviser to the Chairman, Türk Telekom

"SAMENA Council continues to play a vital role in the regional ecosystem for the ICT market. By bringing the regulators and operators together, we all take a vital step toward innovation-driven investments that will shape the future of our industry. And our economies."



**Eng. Salman Bin Abdul Aziz Al-Badran**  
CEO, Viva Kuwait

"The SAMENA Leaders' Summit in my opinion is an excellent opportunity for the telecom leaders in the region to share their experiences in order to increase their competitive edge and achieve further growth and success. I believe that such energetic events and gatherings prepare concerned key persons in facing different challenges in the industry."





# Industry Leaders Speak Out



**Mr. Scott Gegenheimer**  
Group CEO, Zain Group

"The SAMENA Leaders' Summit provides a unique platform for telecom industry stakeholders (operators, regulators, vendors and other advocacy bodies) in the region to share their collective views on the strategic direction of the industry - against the backdrop of macroeconomic pressures, highly competitive markets, digital transformation and innovation. I have found the sessions to be both instructive and insightful, enriched through impactful presentations and discussions on a variety of topics ranging from the need for greater industry-wide collaboration to objective views on regulation to address the convergence of telecoms, media and digital services as well as forward-looking areas such as IoT. I am grateful to the SAMENA organization and its impressive team that has made it all possible."



**H.E. Mr. Houlin Zhao**  
Secretary-General, International Telecommunications Union

"It's a pleasure to be here at this Leaders' Summit and I congratulate the SAMENA Telecommunications Council on its 10th Anniversary. SAMENA Telecommunications Council's 10th anniversary is a testimony to the value it brings to its stakeholders in the region and we look towards them as valuable partner in fostering dialogue among stakeholders in the ICT sector."

The SAMENA Region is one of the most vibrant regions in terms of the adoption of Internet services provided by the Telecom industry. We encourage a positive dialogue among all the stakeholders to ensure that the region can truly leapfrog in terms of pushing the Digital Economy forward. I am happy to see the efforts and successes in the region.

I assure you that ITU, as the United Nations specialized agency for ICTs, will continue to play its part in helping countries in the region and around the world overcome connectivity barriers."



# Industry Leaders Speak Out



**Dr. Akil M Alakil**

Senior Executive Officer, Regulatory Affairs, Mobily

"SAMENA as organization has elevated the industry culture to a higher level by organizing this extraordinary event "SAMENA Leaders' Summit". It gives me the opportunities to exchanged ideas, challenged some, and adopted other ideas with my peers. I am looking forward to other similar events from SAMENA Council."



**Mr. Anas Abbar**

Managing Director, AWI Global FZ-LLC

"Well done SAMENA. A successful conference with insights and vision of leaders in the telecom industry. A great set of sessions that helped me understand the current challenges and future opportunities for emerging markets. An excellent agenda and a great insight. Thank you SAMENA!"



**Dr. Amor BEN DHIA**

CEO, Cellempower

"I have attended the SAMENA 10 Years Council on 19th of May 2016. I had great expectations in terms of quality of organization, content of the conferences and quality of attendees and delegates and networking. I have been enchanted by the overall ambiance and the quality of people I met as well as by the "smile" of the staff of SAMENA Council. I never felt or regretted to have attended. Many thanks to SAMENA Management and to the invitation they extended to me. It was an honor and I definitely recommend the same and future events of SAMENA should you wish to hear, to network and to... smile with their CEO Mr. Bocar Ba."





# Industry Leaders Speak Out



**Mr. Bahjat El Darwiche**  
Vice President, Strategy &

"SAMENA has come a long way in providing a unified voice and a collaboration forum for leading operators and service providers in the region. Having such a platform is key to supporting the development and adoption of policies, regulation, standards, business models, and collaboration initiatives that enable growth and improve efficiency in the telecommunications industry, incentivize investment and development, and broaden value creation opportunities for all ICT stakeholders in the region."



**Mr. Erik Almqvist**  
Managing Director and Head of the Middle East, Goetzpartners

"The SAMENA Council has a longstanding reputation for arranging the most exclusive and senior top leadership conferences for the telecommunications industry in the Middle East, and the 2016 event was arguably the best in its ten year history. My hats off to the SAMENA Council and Mr. Bocar, very well done indeed in arranging this exceptional event."



**Dr. Georg Serentschy**  
Managing Partner, Serentschy

"I found the SAMENA Telecom Leaders' Summit 2016 to be an excellent opportunity for establishing and refreshing business contacts. The presentation, panel discussions and subsequent discussions in the margins of the conference were very useful. These discussions focused on the rollout of high-speed infrastructure, the role of regulators and policy makers, the role of ICT for the society and highlighting the latest technology trends and related opportunities."



# Industry Leaders Speak Out



**Dr. Homoud Alkussayer**  
Vice President Wholesale Sector, STC Group

"As a founding member in 2006, STC is proud to have played an integral role over the past 10-years in evolving and transforming SAMENA into a truly relevant organization for its members and stakeholders. With its ever-increasing global influence and effectiveness in interacting and coordinating with other relevant global fora, I strongly believe that SAMENA is playing a critical role in promoting and supporting the development of Telecoms and ICT, and presenting a unified voice towards the socio-economic development of the SAMENA region."



**H.E. Dr. Hamadoun I. Touré**  
Executive Director, Smart Africa

"Thanks for inviting me to the 10th anniversary of SAMENA Council. The event was another landmark opportunity for all the ICT stakeholders in the region and the rest of the world to get together, celebrate the successful past and make plans for the future that rests on ICT development. I congratulate you for a superb organization and perfect delivery. SAMENA Council has established itself as the Leader in the ICT industry that will usher the whole region into the 4th Industrial Revolution."



**H.E. Dr. Hamad Al-Rawahi**  
Executive President, TRA Oman

"The round table discussion among the policy makers, regulators and operators provided the right ambience and was an excellent opportunity to discuss the current situation arising out of technological advancements / changes in the ICT sector. It was indeed heartening and fulfilling to participate in the proceedings where the focus was the 'consumer' and proposals of service offerings and programs revolved around the vital stakeholder. The regulators imbibed and took note of the flexible approach in the rules and procedures sought by the sector members to pursue innovation in new applications and platforms as well as convergence of service offerings. I was particularly impressed with the 'service orientation' that emerged as the common theme to approach the emerging policies and regulatory practices in the ICT sector. I wish and expect that the close coordination and exchange of ideas like the one we had during the Leaders' Summit among the sector members to continue to shape the policies and regulations that would facilitate the sustained growth of the ICT sector for the benefit of the consumers."





# Industry Leaders Speak Out



**Dr. İhsan KULALI**  
Board Member of ICTA

"The SAMENA Leaders' Summit is a unique event which brings together leaders and decision makers from the region and from the world. This year's Summit was inspiring and informative. I have taken this chance to listen to peers and discuss current trends. Telecommunication sector is the most dynamic sector in which groundbreaking changes may happen in a second. SAMENA Leaders Summit makes possible for high level people to keep up with the pace of this sector. I thank everyone involved in the Organization for this impressive Leaders' gathering."



**Mr. Jawad Abbassi**  
GSMA

"Congrats SAMENA Council on your 10th anniversary. As the conference gathered telecom leaders from across the region, it was a very important and useful platform to discuss the massive changes underway in the TMT space. Well done."



**Mr. Khalid Balkheyour**  
President & CEO, Arabsat

The SAMENA Leaders Summit 2016 provides a unique platform for industry leaders in the region for discussion and to share ideas. Panel discussions and networking were very useful. These discussions not only focused on the current issues but provided a glimpse of what the future of the telecom industry will be, highlighting the latest technology trends and the related opportunities.



# Industry Leaders Speak Out



**H.E. R.M. Manivannan**  
Chairman, SupremeSAT

"Meeting the key telecom players, thought leaders and regulators in the same platform made my participation at the SAMENA 2016 Summit a very productive experience. As we gear ourselves for the future, led by knowledge, SAMENA is well placed to steer it through with its proven track record and leadership. Emerging from a developing nation I firmly believe that SAMENA Council is the right choice to bring nations together making the voice of the developing world heard."



**Mr. Mickael Ghossein**  
Senior Vice President Partners MENAT, Orange Business Services

"The SAMENA Leaders' Summit provides a unique platform for industry leaders in the region and beyond to share their views on where the industry is headed, a clear vision and strategy for the 2030 era, be it on a global scale or a more specific regional level. To me personally, it has always been a pleasant change from my daily management routine, offering me an open and dynamic setting to share ideas with my peers and re-examine the bigger picture. For that, I am grateful to the organization and the impressive team that makes it all possible."  
Et voila. Thank you for your support. All the best."



**Eng. Mohammed Al Ageel**  
Owner and CEO, Future Technology Consulting  
Executive Ambassador, SAMENA COUNCIL

"I have experienced the growth and the development of SAMENA Council since its creation. During my tenure as a board member of SAMENA and a CEO of BRAVO telecom; SAMENA developed a vision and a strategy to be a regional player in the development and the growth of the ICT industry in our region. Today, during the 10th anniversary and the Leaders' Summit, I am very glad to see that our vision has come to reality."





# Industry Leaders Speak Out



**Mr. Magdi Mekki Al MARDI**

International Relations Director, Sudatel Telecom Group.

"I do believe that it is not an easy task to regroup all these leaders in one event! The presence of all these dignitaries reflects the importance of SAMENA and its capability to mobilize the telecom sector players. The topics are relevant and of high interest and the organization of the whole day is extremely professional. The team of SAMENA Council deserves really our respect and admiration."



**Mr. Nic Stirk**

CEO and Founding Partner, SLA Digital

"I thoroughly enjoyed the SAMENA Telecom Leaders' Summit this year. As always the event was extremely well organised and there was significant opportunity for companies to network, meet new friends and potential clients. I found the experience rewarding and would recommend the Summit to other members of the SAMENA council who have not yet attended."



**Mr. Peter Sany**

President and CEO, TM Forum

"The SAMENA Leaders' Summit provides a unique platform for industry leaders in the region and beyond to connect and network to accelerate the digital business agenda. We live in a world of interconnected ecosystems – a world where entire industries are transforming beyond recognition, non-traditional approaches to business are creating a new 'normal', and collaboration and co-creation are essential to survival and growth. I enjoyed the SEMENA Leaders' Summit as it enabled me to connect with my business and thought leaders in an open and dynamic setting for creative discussions and ideas exchange."



# Industry Leaders Speak Out



**Mr. Patrice Lozé**  
Deputy CEO, Orange Jordan

"It had been such a pleasure and honor to represent Orange Jordan "Board Member at SAMENA Telecommunications Council" at the "Telecom Leaders' Summit 2016". I truly appreciated the opportunity to share, discuss and engage with other Telecom Leaders in South Asia, Middle East & North Africa Regions.

SAMENA Telecommunications Council has been acknowledged as the supporting entity for the telecommunication and ICT industry providers to ensure the sustainability of the business through the transformation to the digital era. Moreover, SAMENA has given the participants, members and stakeholders, the opportunity to share their concerns, experience, in addition to opening several discussion panels tackling the new technologies and solutions needed for the continuity of the business. Thank you for an enriched experience"



**Mr. Rashid Al Ahmedi**  
Senior Director Special Projects & External Affairs, Corporate Affairs, Du

"SAMENA has made very important and useful contributions to the industry throughout the past 10 years. It really brought a useful collaboration forum to its members and built a joint interest point of view that helped them fostering their future.

We wish SAMENA very successful journey and we are looking forward as du to work closely with them to move the industry forward."



**Mr. Samer Bazyan**  
Regional Director of the Middle East Yahsat

"It was an honor to attend the SAMENA Council' Leaders' Summit 2016 as well as celebrate the Council's 10th anniversary.

As we become closer to becoming an even more connected society, it was the perfect platform to engage in enriched conversation with operators, regulators and telecom stakeholders. We discussed challenges, together with upcoming opportunities with the new high speed data networks. Overall, the Summit showcased how working collectively maximizes our industry position. I look forward to networking with the industry big players at future events of SAMENA Council. Thank you."





# Industry Leaders Speak Out



**Sheikh Mohamed Isa ALKHALIFA**  
Chairman of SAMENA Council (2011-2013)

"I congratulate SAMENA Council on the 10th anniversary and thanks for the kind gesture of recognizing the previous chairmen. The presence of many top level delegates from operators as well as regulatory authorities, as well as the head of the ITU, reflect on the importance of the Leaders' Summit. I wish SAMENA Council continued success in achieving its objectives."



**Eng. Saud Aldaweesh**

"I thank SAMENA Board and management For their nice gesture of inviting me and for the recognition of x-ceo and chairmen of SAMENA. Looking back in past 10 years I think SAMENA has accomplished most of the goals it was set to achieve. Some challenges facing the industry still exist and need more attention and lobbying, i.e., net neutrality. There are other new challenges in all aspects whether its the new technology such as 5G or regulatory challenges that face SAMENA members and needs to be worked on, to maintain growth and sustainable income. And the challenges of new competition and erosion of traditional Voice and data revenue. I wish you all the success."



**Mr. Tariq Al Awadhi**  
Head of MENA - Government & Regulatory Affairs  
Executive Director Spectrum Affairs  
Spectrum Management Affairs Department, TRA UAE

"I would like to take this opportunity to thank SAMENA for their excellent organization for SAMENA Telecom Leaders' Summit that was held in Dubai on May 19. Great Speakers participated and well known leaders from different Worldwide Telecom Operators and Regulators shared their successful achievements and their future plans. I liked also the high level meeting that was organized between some of top Operators and Regulators, attended only by CEOs and DGs to discuss the future of ICTs in the Arab Countries. It was very nice arrangement by SAMENA, well done. I also participated in the signing ceremony between ITU, the TRA and Shaikh Mohammed Bin Rashid Smart Learning and the excellent arrangement made by SAMENA. I hope I will be able to participate with similar summit again in future and wish you all the success."



# Industry Leaders Speak Out



**Mr. Thomas W. Wilson III**  
CEO / Co-Founder, Teralight Gateway Holdings Inc.

“Regional technology and policy support institutions such as SAMENA Council create awareness of the impacting issues effecting stakeholders in the ICT and Telecoms sector. The ICT and Telecom sector is facing many challenges which, if not addressed appropriately, can greatly alter the productive efficiency value of all industry stakeholders in the business ecosystem and social economic environment. The greater SAMENA region has a unique footprint with regard to developing opportunity and it is bodies such as SAMENA that are able to positively impact the active ecosystem in that region. The SAMENA region, including Africa must adapt quickly regarding changes in technology and operational efficiencies, given the aggressive nature of opposition forces within the regional booming mobile usage of broadband via Smartphone device in the market.

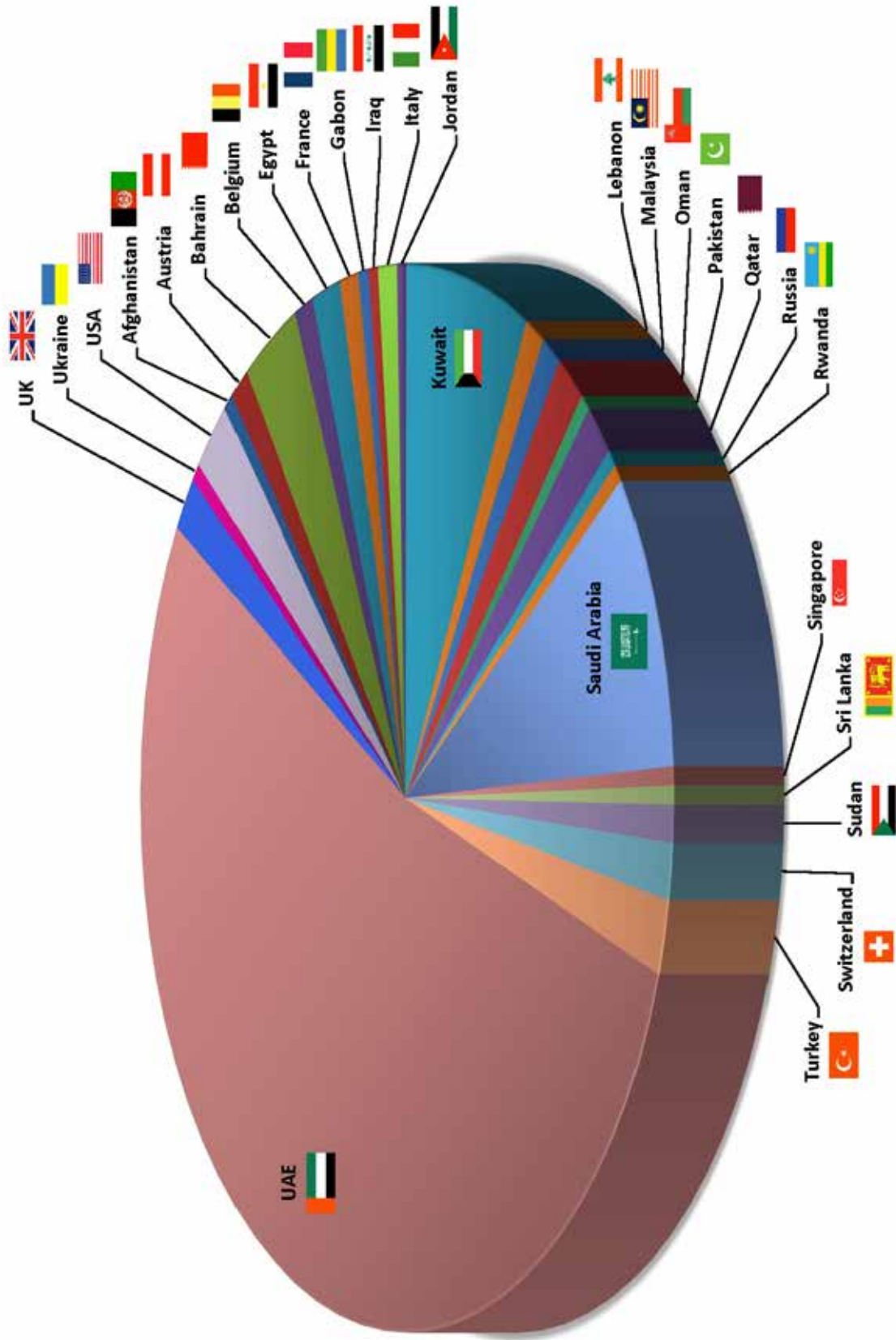
The dilemma facing SAMENA members and other industry stakeholders is to either stay in place with existing legacy infrastructure or to bet on the changing landscape which yields quickly into the unknown specter of the future, where non-traditional operators and service providers challenge the status quo of operators and governments in the region at an ever quickening pace. Those that do not adapt to the ever changing broadband driven environment will surely be left behind.

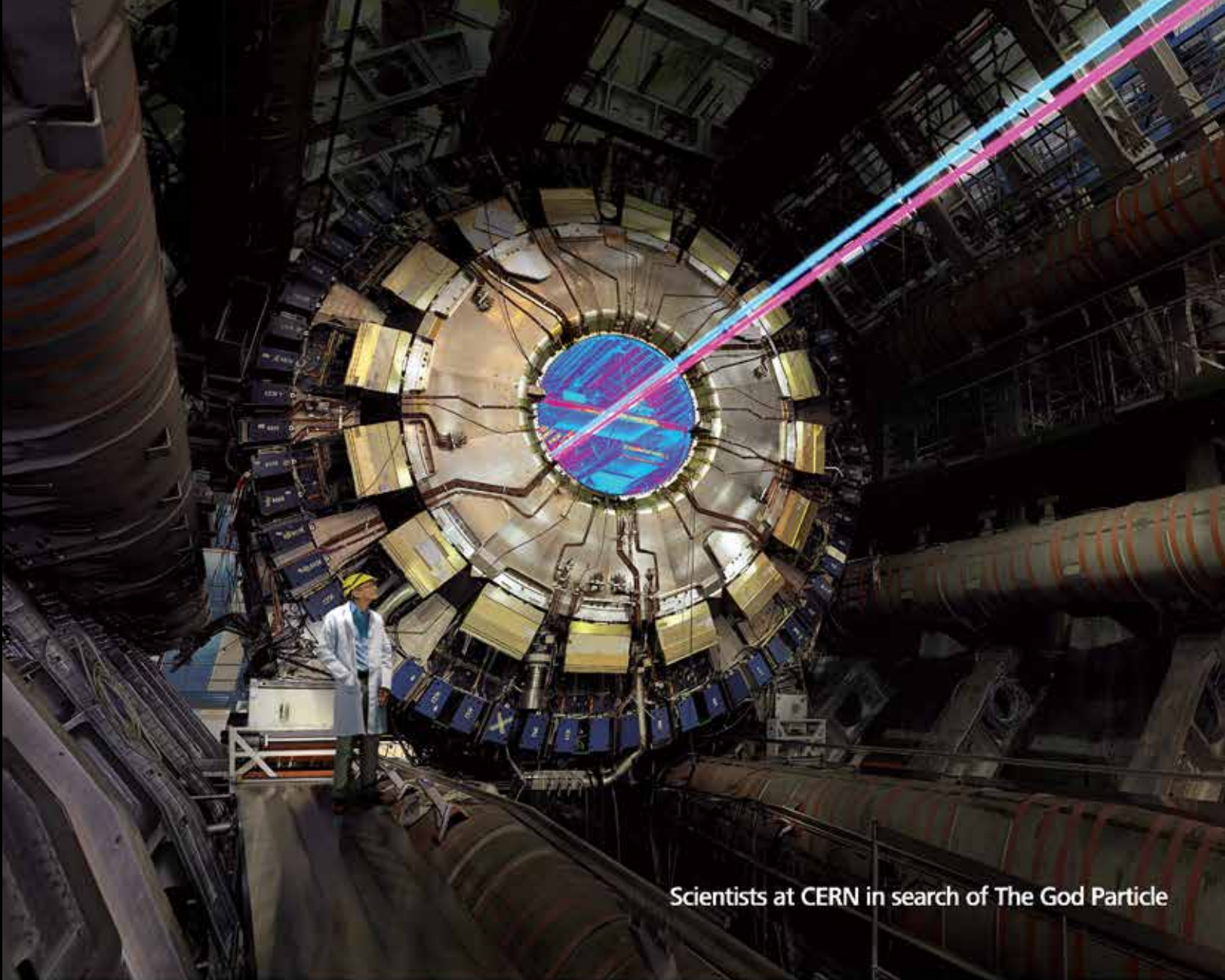
SAMENA Council can be and should be the vehicle of choice for voicing concerns in the operating environment and developing value-add partnerships with investment providers, operators, governmental policy and regulatory institutions and leadership, as well as leading technology suppliers to take membership into the future with a greater handle on the choices available. The sky is the limit. SAMENA's start was very humble. However, through its leadership of its Board and its membership, SAMENA Council has sealed its status as a premier, reliable regional source of information, knowledge sharing and industry collaboration for all stakeholders in the ICT and Telecoms industry.”





# SAMENA Council Telecom Leaders' Summit 2016 Attendees





Scientists at CERN in search of The God Particle

**Decades of patient investment,  
for a moment of divine clarity**

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